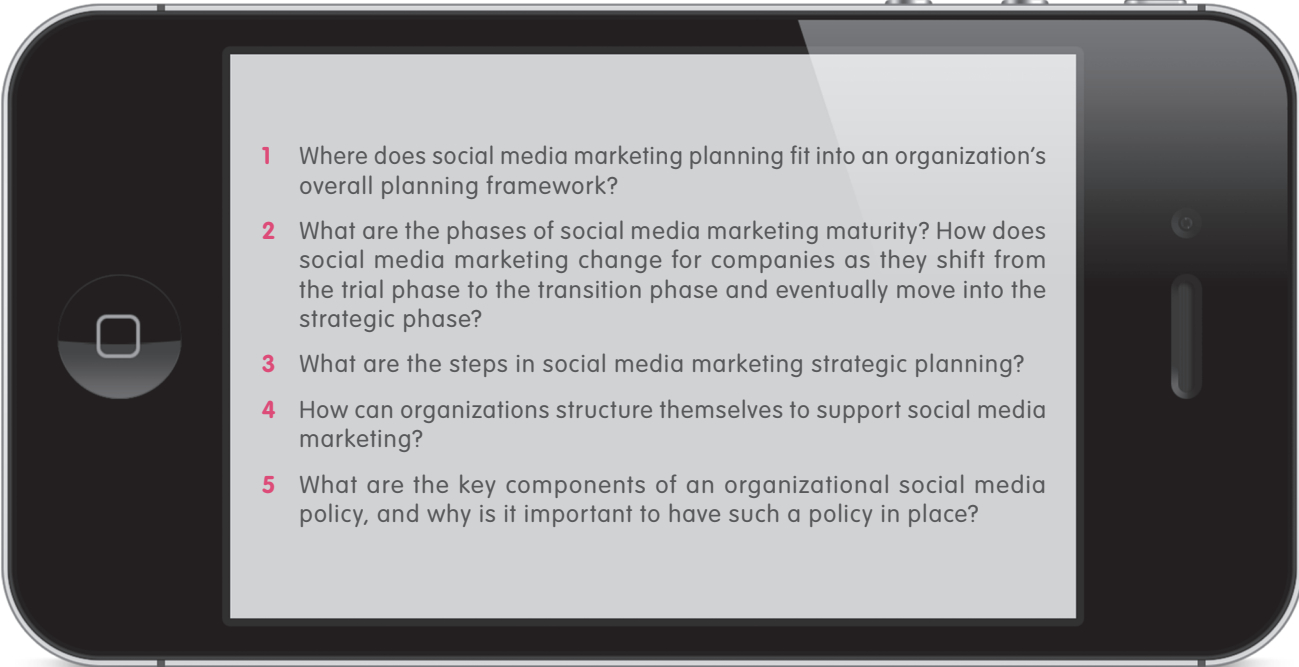




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A Guide to Chapter Two: Social Media Marketing Strategy

LEARNING OBJECTIVES

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- 1 Where does social media marketing planning fit into an organization's overall planning framework?
 - 2 What are the phases of social media marketing maturity? How does social media marketing change for companies as they shift from the trial phase to the transition phase and eventually move into the strategic phase?
 - 3 What are the steps in social media marketing strategic planning?
 - 4 How can organizations structure themselves to support social media marketing?
 - 5 What are the key components of an organizational social media policy, and why is it important to have such a policy in place?

Chapter Overview

This chapter introduces the reader to the planning process, social media strategy, and the ways organizations can structure social media. It includes an outline for a marketing plan and for a social media marketing plan. Note that there is a sample social media plan provided in the book.

CHAPTER SUMMARY



Where does social media marketing planning fit into an organization's overall planning framework?

Social media marketing should be planned as part of an organization's marketing plan. Like integrated marketing communications plans, organizations may also develop stand-alone plans offering greater social media marketing.

What are the phases of social media marketing maturity? How does social media marketing change for companies as they shift from the trial phase to the transition phase and eventually move into the strategic phase?

The phases of social media marketing maturity are trial, transition, and strategic. In the trial phase, organizations are pursuing social media tactics in an ad hoc manner, with a focus on gaining experience in social media. The tactics are not well linked to the organization's overall marketing plan and may be haphazardly executed. Organizations in the transition phase think more systematically about how to plan social media activities that support marketing objectives. When an organization enters the final strategic phase, it utilizes a formal process to plan social media marketing activities with clear objectives and metrics. Social media are now integrated as a key component of the organization's overall marketing plan.

What are the steps in social media marketing strategic planning?

The social media marketing strategic planning process consists of the following steps:

- Conduct a situation analysis and identify key opportunities.
- State objectives.
- Gather insight into and target one or more segments of social consumers.
- Select the social media channels and vehicles.
- Create an experience strategy.
- Establish an activation plan using other promotional tools (if needed).
- Manage and measure the campaign.

How can organizations structure themselves to support social media marketing?

Companies can structure themselves as centralized, decentralized, hub and spoke, dandelion, or holistic. Each option represents a trade-off of control and responsiveness.

What are the key components of an organizational social media policy, and why is it important to have such a policy in place?

Policies may include several guidelines such as standards of conduct, disclosure requirements, and standards for posting intellectual property, financial information, and copyrighted information.

Chapter Outline

I. Strategic Planning and Social Media Marketing

- Strategic planning is the process of identifying objectives to accomplish, deciding how to accomplish those objectives with specific strategies and tactics, implementing the actions that make the plan come to life, and measuring how well the plan met the objectives.
- A **marketing plan** is a written, formalized plan that details the product, pricing, distribution, and promotional strategies that will enable the brand in question to accomplish specific marketing objectives. See Figure 2.1 for a marketing plan structure.
- Planning ensures that an organization understands its markets and its competitors.
- **Integrated marketing communications (IMC) plans or marcom plans** develop an in-depth social media marketing strategy.
- Figure 2.2 provides the structure of a social media marketing plan.

A. The Phases of Social Media Marketing Maturity

1. **Stunts** are one-off ploys designed to get attention and press coverage.
2. **Social media marketing maturity** is a result of time and experience, in that we tend to see applications that start as one-time “experiments” often morph into more long-term and carefully thought-out elements that the organization integrates with all the other communication pieces it uses to reach customers.
3. Three phases of maturity
 - a. The **trial phase** is the first phase. Organizations test out social media platforms, but they don’t really consider how social media can play a role in the overall marketing plan.
 - b. The **transition phase** is the second phase. Here social media activities still occur somewhat randomly or haphazardly but a more systematic way of thinking starts to develop within the organization.

- c. The **strategic phase** is the third phase. Here a company utilizes a formal process to plan social media marketing activities with clear objectives and metrics.

II. Social Media Campaigns: The Strategic Planning Process

A. Situation Analysis

1. The **situation analysis** details the current problem or opportunity the organization faces.
2. A review of the brand's **SWOT analysis** will highlight relevant aspects of the firm's internal and external environment that could affect the organization's choices, capabilities, and resources.
3. The **external environment** consists of those elements outside the organization—the organization's opportunities and threats—that may affect its choices and capabilities.

B. Identify Social Media Marketing Objectives and Set Budgets

1. An **objective** is a specific statement about a planned social media activity in terms of what that activity intends to accomplish.
2. A well-stated, actionable objective should include the following characteristics:
 - a. Be specific (what, who when, where).
 - b. Be measurable.
 - c. Specify the desired change (from a baseline).
 - d. Include a time line.
 - e. Be consistent and realistic (given other corporate activities and resources).
3. Social media is not free. In planning a social media campaign, a budget must be allocated that ensures sufficient resources to accomplish the goals—just like in a traditional ad program.
4. The **percentage of ad spend** method assigns a set portion of the overall advertising budget for the organization to social media activities.
5. The **competitive parity method** uses competitors' spending as a benchmark.
6. The **objective-and-task method** considers the objectives set out for the campaign and determines the cost estimates for accomplishing each objective.

C. Profile the Target Audience of Social Customers

1. **Social media profiles** include demographic, geodemographic, psychographic, and product-usage characteristics.
2. The planner must assess what it means to speak to the audience in the social media space.

D. Select Social Media Channels and Vehicles

1. The **social media mix** describes the combination of vehicles the strategy will include to attain the organization's objectives.
2. The options are chosen from the four zones of social media.
3. Figure 2.3 shows an example.

E. Create Experience Strategy

1. **Message strategy** refers to the creative approach we will use throughout the campaign.
2. A **positioning statement** is a single written statement that encapsulates the position the brand wishes to hold in the minds of its target audience.
3. A **creative brief** is a document that helps creatives channel their energy toward a sound solution for the brand in question. For social media campaigns, it might be called an experience brief or a propagation brief.
4. Several questions are answered in a creative brief.
 - a. What are the campaign goals and/or communication tasks?
 - b. How is the brand positioned?
 - c. Who is the target audience?
 - d. Is there another group of people who can persuade the target audience to follow them?
 - e. What are the existing creative assets? How can the brand's creative foster a social experience?
 - f. How can we integrate with other branded media being used by the organization, and how long do we have to execute?
 - g. What experiences are possible given target market needs and motives, the available channels, and the creative assets? How can we design these experiences to maximize device portability and access?
 - h. What content will be needed?
 - i. How will experience engagement be extended and shared throughout the social channels?
5. **Discovery** is the term used to describe the research stage of the plan. The creative team will then go through a process of ideation and concepting.
6. The brand is represented in social media as a social persona. The social persona may be the brand's corporate image or a spokescharacter.

F. Integrate with other Promotional Components and Establish Campaign Timeline

1. Campaigns are not necessarily events with fixed start and stop dates.
2. Campaigns can mix short and long term goals.

G. Execute and Measure Outcomes

1. There are several common mistakes made in social media marketing.
 - a. Have a presence in the community of interest. Focusing on presence can result in brand assets that are underutilized and underperforming in terms of the objectives set for the campaign.
 - b. A related issue is the failure to introduce new, fresh, and relevant content.
 - c. Social media works differently than does traditional advertising, and may require patience before results are delivered.
 - d. It's not uncommon for organizations to focus on action steps rather than desired outcomes from social media.
 - e. Social media lives or dies on the quality of the content a platform offers to users. That content must add value to the social community.
 - f. Organizations fail to properly measure results.

III. Develop a Planning Structure in the Organization

A. The Social Media Policy

1. A **social media policy** is an organizational document that explains the rules and procedures for social media activity for the organization and its employees.
2. Organizations must decide on:
 - a. standards of conduct;
 - b. disclosure requirements;
 - c. standards for posting intellectual property, financial information, and copyrighted information.

B An Organizational Structure to Support Social Media

1. A **center of excellence model** pulls people with different kinds of expertise from across the organization to participate.
2. There are five basic models for social media structure:
 - a. In the **centralized structure**, the social media department functions at a senior level that reports to the CMO (Chief Marketing Officer) or CEO and is responsible for all the social media activations.
 - b. In the **organic structure**, no one person owns social media. Instead, all employees represent the brand and work social media into their roles.
 - c. In the **hub and spoke** (also called the coordinated) model, a team of people who are cross-functionally-trained are ready to address various social media needs.

- d. The **dandelion model** is essentially a multi-layered hub and spoke model.
- e. The **holistic model** is currently the least used. It truly refers to a structure within which all employees are empowered to use social media, use social media, and do so according to the company's strategy.

C. Social Media Management Systems

1. Regardless of the structure a company takes or the policy it develops, they must also devise a day-to-day system for managing the content, content delivery, and response to user-generated content that are all a part of a social media marketing campaign.
2. HootSuite offers a useful system and people can become certified in HootSuite. If you haven't done so yet, check out HootSuite University.

Box Insights

The Dark Side Box: HMV's Twitter Feed

HMV is an example of a company in the trial phase of social media marketing. An intern developed its Twitter account and an employee used it to tweet comments made at a company meeting during which many were being fired.

Bytes to Bucks Box: Metro's Dumb Ways to Die

This box describes a campaign from Metro designed to reduce accidents near railways. Metro created a video shared online. The video went viral allowing the memorable message to achieve a high reach and frequency. You can see the video on YouTube. Simply search "dumb ways to die" or use the Zones YouTube channel.

REVIEW QUESTIONS



1. *Why do some organizations enter the trial phase without planning and research? Is there value in getting social media experience before social media marketing becomes part of the marcom plan?*

Organizations in the trial phase test out social media platforms, but they don't really consider how social media can play

a role in the overall marketing plan. In these early days, most groups focus on learning to use a new form of communication and exploring the potential for social media as a venue. It isn't necessarily a bad thing to test the waters of social media. Companies need, especially early on, to experiment—to play in the sandbox, so to speak. Doing so helps them

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to brainstorm ideas to use social media and understand what it takes to succeed in this brave new world.

2. Explain the three phases in the social media marketing maturity life cycle.

The trial phase is the first phase of the adoption cycle. Organizations in the trial phase test out social media platforms, but they don't really consider how social media can play a role in the overall marketing plan. In these early days, most groups focus on learning to use a new form of communication and exploring the potential for social media as a venue. As organizations mature in their use of social media marketing, they enter a transition phase. During this phase, social media activities still occur somewhat randomly or haphazardly but a more systematic way of thinking starts to develop within the organization. When an organization enters the final strategic phase, it utilizes a formal process to plan social media marketing activities with clear objectives and metrics. Social media are now integrated as a key component of the organization's overall marketing plan.

3. What are the forms of organizational structure used by companies embracing social media marketing? What are the pros and cons of each?

The organizational task is to assign the least number of resources needed internally and then supplement those resources with help from the organization's social media agency resources. There are five basic models for social media structure:

1. In the **centralized structure**, the social media department functions at a senior level that reports to the CMO (Chief Marketing Officer) or CEO and is responsible for all the social media activations. The potential problem here is that all social media activity may not be adequately represented. Is customer care going to be good if social media marketing is housed under marketing rather than customer service?
2. In the **organic structure**, no one person owns social media. Instead, all employees represent the brand and work social media into their roles. This is implemented through training and used across the organization. The danger here is that the tools can end up off message. Any employee can sign up to respond to customer queries on Twitter. However, the company must have a well-developed social media policy in place to guide employee behavior in social communities.
3. In the **hub and spoke** (also called the coordinated) model, a team of people who are cross-functionally-trained are ready to address various social media needs. This is currently the most popular structure for social media management.
4. The **dandelion model** is essentially a multi-layered hub and spoke model. It is appropriate for companies with SBUs that still represent a core brand.
5. The **holistic model** is currently the least used. It truly refers to a structure within which all employees are

empowered to use social media, use social media, and do so according to the company's strategy.

4. *Explain the steps in the social media marketing strategic planning process.*

Those organizations that have moved beyond the trial and transition phases of social media marketing maturity develop strategic plans for social media that incorporate components of the social media mix as channels to accomplish marketing objectives.

- **Situation Analysis.** The first step in developing the plan is much the same as it is in the creation of traditional strategic plans—research and assess the environment.
- **Identify Social Media Marketing Objectives and Set Budgets.** In this stage of the process, the planner elaborates on what is expected of the social media campaign and what financial and human resources are available to meet those objectives.
- **Profile the Target Audience of Social Consumers.** Social media marketing plans, like any marketing plan, must target the desired audience in a meaningful and relevant manner.
- **Select Social Media Channels and Vehicles.** Once the organization understands who it wants to reach, it's time to select the best social media mix to accomplish this. The zones of social media make up the channel and vehicle choices available for a social media mix. Similar to a more traditional marketing mix, the social media mix describes the combination of vehicles the strategy will include to attain the organization's objectives.

- **Create an Experience Strategy.** If we were planning an advertising campaign, the next step would be to identify a creative message strategy.
- **Integrate with other Promotional Components and Establish Campaign Timeline.** Traditional media campaigns typically live a designated lifespan with timing tied to the accomplishment of specific objectives. For social media, though, campaigns are not necessarily events with fixed start and stop dates. Conversations in communities continue over time, and a brand's social media marketing presence should do this as well.
- **Execute and Measure Outcomes.** In the final stage of the strategic planning process, we implement the plan and measure the results.

5. *What approaches to budgeting can be used by organizations planning for social media marketing?*

The percentage of ad spend method assigns a set portion of the overall advertising budget for the organization to social media activities. Some use a variation, where they allocate a percentage of online marketing funding to social media. The competitive parity method uses competitors' spending as a benchmark. Like advertiser share of voice, competitive parity is based on the belief that spending the same or more on social media marketing will result in a comparable change in share of attention for the brand. Lastly, the objective and task method considers the objectives set out for the campaign and determines the cost estimates for accomplishing each objective. This method builds the budget from a logical base with what is to be accomplished as the starting point.

EXERCISES



1. Visit www.thecoca-colacompany.com/socialmedia/ where you'll find Coca-Cola's social media policy. Identify the three key components WOMMA recommends be included in a corporate social media policy. How could the policy be improved?

Organizations must decide upon:

- Standards of conduct: Standards of conduct in a social media policy refer to the basic expectations for employee behavior in social communities.
- Disclosure requirements: Transparency is key in online communities. Employees must disclose that they are affiliated with the organization. If they are receiving material compensation or gifts in exchange for posting, this must be disclosed.
- Standards for posting intellectual property, financial information, and copyrighted information.

WOMMA recommends that organizations keep all intellectual property and private financial information confidential. Prior to posting copyrighted information, appropriate permissions should be collected. Student answers should vary regarding the Coca-Cola social media guidelines improvement.

2. Identify a social media campaign for a favorite brand. In what experiences does the campaign invite you to take part? Does the campaign include share technologies to ensure your activities are shared with your network?

Answers will vary, but use this as an opportunity to point out the difference between a social media experience that truly enables participation and sharing versus a basic message delivered via advertising.

Ideas for Class Activities or Out-of-Class Assignments

Remember to take a look at the Zones of SMM YouTube channel for videos that relate to the chapter.


Other Resources:

Database of Social Media Policies – <http://socialmediagovernance.com/policies.php>

Video – Brain Solis on Social Corporate Structure – <http://www.youtube.com/watch?v=jo05QaD-mZU>

Discussion Prompt:

For this unit's discussion forum, select a brand which is using social media for marketing and create a "reverse-engineered" experience brief for its social media marketing strategy. To do this, you will identify a campaign or activity for a target brand based on social media. You will then write the brief that you think may have been used to plan the social



media marketing strategy you can see being used. Your brief should include one or more marketing objectives stated using the guidelines in the text, a brief but highly relevant profile of the target audience, the brand's experience in social media in the past, the zones of smm the brand will use (did use), and the experience that ties the zones together, which was designed to inspire the target audience to engage with the brand and share the brand and the social experience with their own networks. Once you've explained the strategy as you think it was posed prior to execution, assess it. What could have been done better?